

## **Setting Up the Olly Interface**

## Contents

Introduction .....	3
What is Olly? .....	3
Summary .....	3
Accessing Olly .....	3
Olly Setup Check List.....	4
Formats.....	4
How Formats Work .....	4
Planning Collection Formats .....	6
Planning GMD Formats .....	7
Modifying Format Names .....	8
Allocating Formats to Collections and GMDs .....	9
Allocate a Format to a GMD .....	9
Allocate a Format and Reader Age to a Collection.....	10
Olly Display Setup.....	12
Home Screen Text .....	12
Our News Text .....	13
Cross Branch Viewing Privileges .....	13
Direct Links to Olly .....	14
Olly Display Name.....	15
Other Parameters.....	15
OllyNewDays .....	16
OllyLibraryName.....	16
defaultBranch .....	16
New "Interesting Resources".....	17
Pick & Click .....	18

# Introduction

## What is Olly?

Olly is a simplified search interface to help junior users find resources without having to construct complicated searches. Imagine you take all the resources in your library and sort them into nine containers, where each container is of a specific type. All of the stories will go into one container. All of the non-fiction will go into a "facts" container. The user can then rummage through one or more containers to find items they want.

These containers are called formats. The user clicks on one (or more) format to look in, and then searches through it. In other words, Olly uses a built in search filter to limit the search to particular type of items.

## Summary

This document describes how to set up the Olly OPAC interface for Softlink Oliver version 3.5.2.3 and higher.

Olly is an additional OPAC interface that is intended for use by younger students. It does not replace the existing OPAC interface.

For existing Oliver clients, Olly is a registration controlled feature. To use Olly you must purchase this module (if not already included) and change your registration details. You may also have to upgrade your current Oliver system. For information about upgrading and changing your registration details, refer to the *Oliver Upgrade Guide*.

## Accessing Olly

To view Olly, navigate to the OPAC and click either the *Olly* menu option or the *Olly* tab. This can be set up as a direct link which will be covered later on.



## Olly Setup Check List

To setup Olly for general use, the following tasks should be performed:

- Allocate Formats to Collections and GMDs
- Modify the User Defined text

The following tasks are optional:

- Modify the Format names
- Determine the Cross-Branch viewing privileges
- Create direct URL links to Olly
- Set the following parameters: OllyNewDays, OllyLibraryName, defaultBranch
- Change the Pick & Click records

## Formats

Olly groups resources using the concept of "Formats" to provide one-click access to titles by their physical and/or content type, e.g. Picture Books (Picture), Fiction Books (Story), Toys & Games (Toy). Up to nine Formats can be used, and their names can be changed, however, each format corresponds to a pre-defined icon that is displayed in the Olly Search results. See the image below.



It is also possible to rename the Formats you see above if desired. This process will be covered later on in Olly Setup as it is important to plan how your Olly search page will work before you start changing parameters. The first step is to decide how you will allocate your formats.

## How Formats Work

Formats are determined by the Collection assigned to the Copy record (Cataloguing > Resources > Items > Collection) or the GMD assigned to Resource record (Cataloguing > Resources > GMD).

Each GMD and each Collection can optionally have a single Format specified via System > List Files. If the GMD for a Resource record does not have a Format assigned, then the Collection Format of the first Copy record for the Title is used.

If neither the GMD for the resource, nor the Collection for a Copy has a Format specified in the List Files, the resource will only be shown under the *ALL* Format icon.

By default the *All* Format is selected when the results are initially displayed. In the image below, three Resources are displayed when the *All* Format is selected.



Users can narrow their search by clicking a different Format icon; this displays the matching results for just the selected Format. In the image below only one Resource is displayed for the *Story* Format.



It is **not** recommended to allocate a Format to the GMD of Text as it is assigned frequently to Resources. Instead the Collection of the Copy record will be used to determine the Format.

In the following table various combinations of GMDs and Collections, with some examples of Formats are selected, are listed to show which Format would be applied in different scenarios.

Collection	Assigned Format
Picture Books	Picture
Fiction	Story
Audiovisual	No format
Non-Fiction	Fact
Magazines	Magazine

GMD	Assigned Format
Text	No format
Website	Web
CD-ROM	Sound
DVD	Video
Game	Toy

- Scenario A. Our item has a Collection (Fiction) and GMD (Text)  
The Format used will be *Story*.
- Scenario B. Our item has Collection (Fiction) and GMD (DVD)  
The Format used will be *Story*.
- Scenario C. Our item has Collection (Audiovisual) and GMD (DVD)  
The Format used will be *Video*.

## Planning Collection Formats

The simplest way to set up containers is to allocate your library collections to different containers. Here are some common collections and some suggestions on what format (container) each should go into.

Non-Fiction	Fact
Fiction	Story
Reference	Fact
Big Books	Story or Picture
Periodicals	Magazine
Magazines	Magazine

Make a list of all of your library collections and circle the appropriate container name beside it. There may be a collection or two that you can't classify. That's ok. Keep going through your list and allocate what you can.

[illegible]

## Planning GMD Formats

You may now have a few collections that are unallocated. This is where we will use the GMD to decide the appropriate container. If the collection is not allocated to a container, Olly will try and allocate a format based on GMD.

As an example, you may have an audio-visual collection. You can't put this into just one container, as Olly has both video and sound containers. Websites are another example. You might have a collection of websites, or maybe not. This is where we will use GMDs to allocate resources to containers. Here are some examples of how to match GMDs to containers.

DVD	video
Video recording	video
Sound recording	music
Game	toy
Website	web

There are a few types of resources that can't be easily put into containers. These include computer file and CD. These items might be music or computer programs (or something else entirely). If you can't decide, you can leave the GMD blank as well. Any items that are not allocated to a format by collection or GMD can still be found when the ALL format is selected in a search. They just won't be in a specific container.

Please note that you do not need to allocate items by both collection and GMD. If a collection is allocated to a container, that is how the item will be classified. Only if a collection is not allocated will Olly then check the GMD. If neither is specified, the item can still be found by searching in the All container.

GMD Name	Format (circle one, if applicable)
	picture story fact magazine web video sound toy
	picture story fact magazine web video sound toy
	picture story fact magazine web video sound toy
	picture story fact magazine web video sound toy
	picture story fact magazine web video sound toy
	picture story fact magazine web video sound toy
	picture story fact magazine web video sound toy
	picture story fact magazine web video sound toy
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	picture story fact magazine web video sound toy
	picture story fact magazine web video sound toy
	picture story fact magazine web video sound toy
	picture story fact magazine web video sound toy

You should now have all the information you need to set up Olly. You should have a list of Collections and the format that will be allocated to it. And you might have a list of GMD's and their formats.

## Modifying Format Names

There are nine Formats, each of which can their name changed via the appropriate *Olly*<format\_name>Format parameter. Formats can also be hidden by editing the Format's data to be blank. Resources that match a hidden a Format are only displayed under the *ALL* Format icon.

To view these parameters, navigate to System > Custom Parameters and perform a search for *olly*\*.



The parameters are listed in the same order that they are displayed on the *Olly Search Results* screen (see the following image).

The screenshot shows the 'System' menu on the left and a search interface for 'Custom Parameters'. The search bar contains 'olly\*' and the search button is visible. Below the search bar, there are links for 'Advanced', 'All', and 'New Records'. The results table shows parameters like libraryName.

No.	Parameter	Data	
1	<i>OllyAllFormat</i>	all	E
2	<i>OllyPictureFormat</i>	picture	E
3	<i>OllyStoryFormat</i>	story	E
4	<i>OllyFactFormat</i>	fact	E
5	<i>OllyMagazineFormat</i>	magazine	E
6	<i>OllyWebFormat</i>	web	E
7	<i>OllyVideoFormat</i>	video	E
8	<i>OllySoundFormat</i>	sound	E
9	<i>OllyToyFormat</i>	toy	E

To edit a parameter click the appropriate *E* link, change the value, and then click the *Save* button.

For each Format that is not used by any GMD or Collection, it is advised that the associated parameter is edited to make its *Data* field blank. This will hide the icon from the *Search Results* screen.



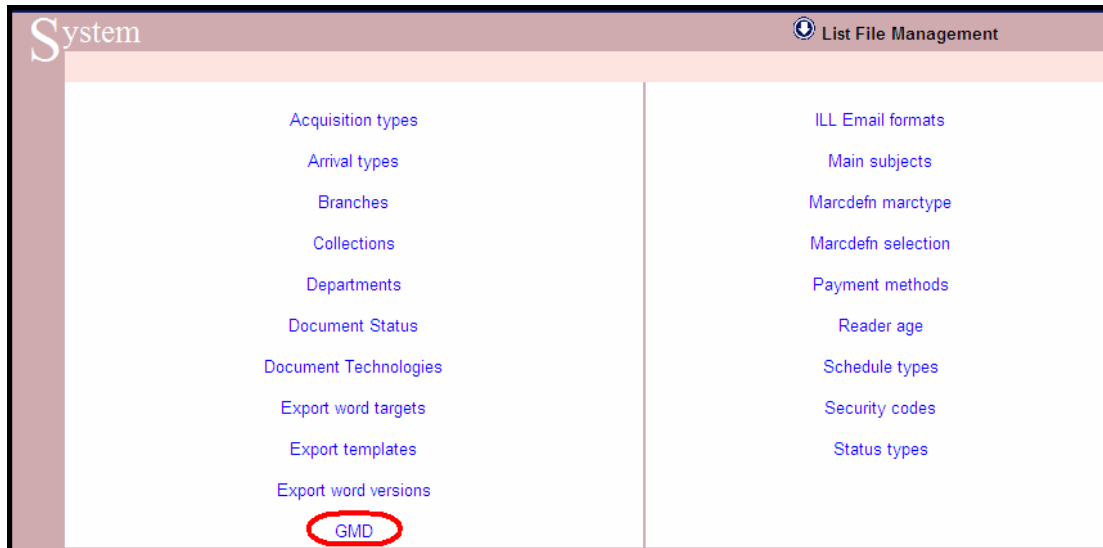
## Allocating Formats to Collections and GMDs

If Formats are not allocated to any Collections or GMDs, which is the default case, only the *All* Format will display any search results in Olly. For each Format that you want to have search results for, at least one GMD or one Collection should have that Format allocated to it in the List Files.

### Allocate a Format to a GMD

Remember that the GMD of text **should not** have a Format assigned to it. To allocate a Format to a GMD perform the following steps:

1. Navigate to **System > List Files**.
2. Click the **GMD** link.



3. Click the **Edit** link for a GMD.

Description	Bibtype	Format Type				
activity card					Delete	Edit
art original					Delete	Edit
art reproduction					Delete	Edit
braille					Delete	Edit
chart					Delete	Edit
computer file	Computer file				Delete	Edit (circled in red)
diorama					Delete	Edit

4. From the **Format Type** list select a **Format**, then click **Save**.

The screenshot shows the 'GMD (GMD)' form. At the top right, there are 'Save' and 'Cancel' buttons. The 'Save' button is circled in red. Below the header, there are three rows of form fields: 'Description:' with the value 'computer file', 'Bibtype:' with a dropdown menu showing 'Computer file', and 'Format Type:' with a dropdown menu showing 'Web' (circled in red).

## Allocate a Format and Reader Age to a Collection

Formats are allocated to Collections in the same manner as GMDs. That is, navigate to System > List Files > Collections and edit each Collection that you wish to assign a Format to. Then select a Format from the list and click the Save button. See the image below.

The screenshot shows a web form titled 'System > List File Management > Collections (COLLECTION)'. At the top right, there are 'Save' and 'Cancel' buttons, with 'Save' circled in red. The form contains several fields: 'Description:' with the value 'FICTION'; 'Format Type:' with a dropdown menu showing 'Story', which is also circled in red; 'Reader Age From:' with a dropdown menu showing '5'; 'Reader Age to:' with a dropdown menu showing '19'; and 'Overwrite Reader Age:' with radio buttons for 'Yes' and 'No', where 'No' is selected. A small note at the bottom states: 'Sets whether to overwrite existing reader ages next time housekeeping is run'.

As an option, Copy records with certain Collections that are not suitable for Olly users, such as Reference and Senior Fiction, can be hidden from the Olly interface. By default no Collections are hidden.

If you do not want to hide any Collections, then none of the following settings need to be changed.

Collections are shown based on various Age settings, namely:

- *ollySuitabilityAgeFrom* parameter – This parameter, from System > Custom Parameters, determines the minimum Suitability Age of the Copies that will be displayed in Olly. The default value is blank; entered values must be a numerical number.
- *ollySuitabilityAgeTo* parameter – This parameter, from System > Custom Parameters, determines the maximum Suitability Age of the Copies that will be displayed in Olly. The default value is blank; entered values must be a numerical number.
- Each Collection has a *Reader Age From* and *Reader Age To* setting. When a Copy record is created, it takes on the current Reader Age settings of the Collection it belongs to. These ages are not displayed on the Copy records; they are hidden fields. The default Reader Age values for all Collections are blank.

**Note:** The Collection's Reader Age settings and the *ollySuitabilityAge* parameters do not have any bearing on the Borrower's actual age; rather they determine if the Copies with various Collections are displayed at all within Olly. Resources that do not have any suitable Copies are not shown in Olly.

For a Collection to be displayed in Olly, its *Reader Age From* and *Reader Age To* range must either fall within the *ollySuitabilityAges* or overlap them.

The following table shows several Collections with example Reader Age settings, and notes if they would be displayed in Olly when the *ollySuitabilityAgeFrom* parameter is set to 5 and the *ollySuitabilityAgeTo* parameter is set to 10:

Collection	Reader Age from	Reader Age to	Shown in Olly?
Fiction	5	18	Yes – overlaps the range
Atlases	9	18	Yes – overlaps the range
Junior Fiction	5	9	Yes – falls within the range
Senior Fiction	11	18	No – does not overlap the range
Reference	(blank)	(blank)	No – ages have not been set

When a Collection's Reader Age is changed, the existing Copy records with that Collection are only updated when the *Overwrite Reader Age* field is set to Yes (see the image below) and a Housekeeping is performed.

The screenshot shows the 'System' form for editing a Collection. The form has a header bar with 'System' and 'List File Management'. Below the header, there's a section for 'Collections (COLLECTION)' with 'Save' and 'Cancel' buttons. The form contains several fields: 'Description' (REFERENCE), 'Format Type' (Fact), 'Reader Age From' (14), and 'Reader Age to' (19). The 'Overwrite Reader Age' field is highlighted with a red circle, showing radio buttons for 'Yes' (selected) and 'No'. Below this field, there's a small text note: 'Sets whether to overwrite existing reader ages next time housekeeping is run'.

If the *Overwrite Reader Age* option is set to *No*, then only Copies that are created after the Reader Age is changed will receive the new age settings. After each Housekeeping is completed, the *Overwrite Reader Age* options for all Collections are automatically set to *No*.

To hide Collections in Olly, ensure the following processes are performed: Edit both the *ollySuitabilityAgeFrom* and *ollySuitabilityAgeTo* parameters, from System > Custom Parameters, and specify what age range of Collections is suitable for the Olly users.

Edit each Collection, via System > List Files > Collections, and select a *Reader Age From* and *Reader Age To* value. Also set the *Overwrite Reader Age* option to *Yes*.

Start the *Housekeeping* process by navigating to System > *Housekeeping* and click the *Run All* button. This will allocate Reader Ages to the existing catalogue. **Note:** no other users should be using Oliver during the Housekeeping.

## Olly Display Setup

The text on the Olly *Home* screen for logged in users and the *Our News* screen comes with some pre-defined text that should be modified before general use by students.

### Home Screen Text

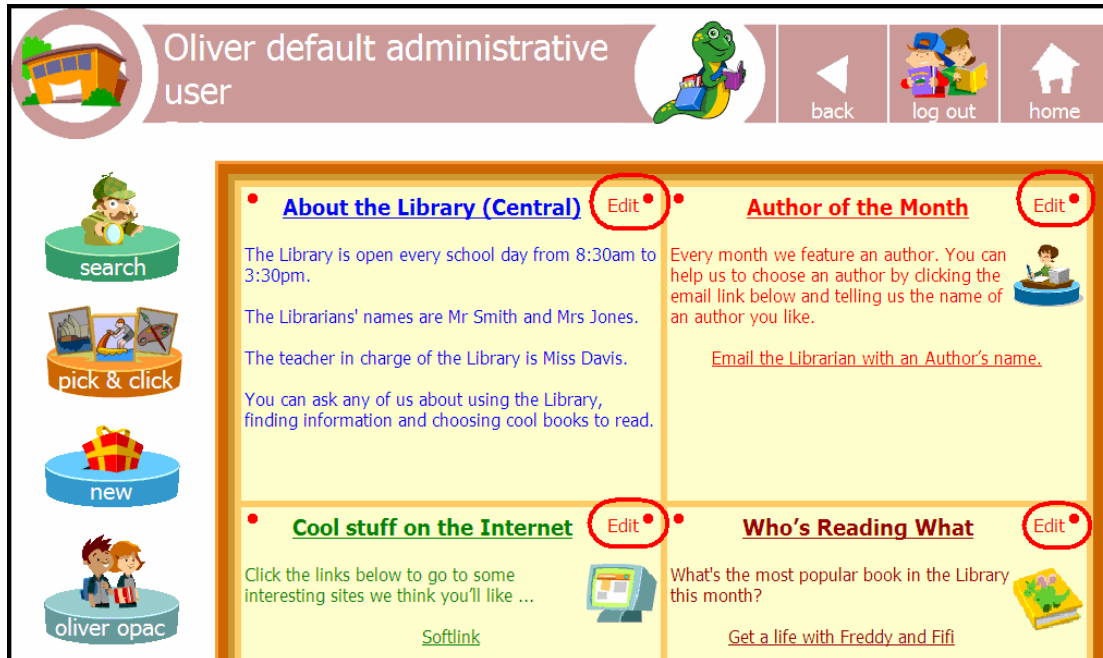
The *Home* screen that is displayed for logged in users has a welcome message (see the following image). This screen is displayed when a user logs into Olly and whenever they subsequently click the Home icon.

To edit this text, login as a user that has the *Admin* security group and click the *Edit* link.



## Our News Text

The *Our News* screen's default text is shown in the following image. The text on this screen has four sections, and each section is modified in the same manner as the text on the *Oliver Login* screen. That is, login as a user that has the *Admin* security group, click the appropriate *Edit* link, make the changes and then click *Save*. For further details see the *Modifying the Library Home Screen and Banner* section of the *Oliver Reference Manual*.



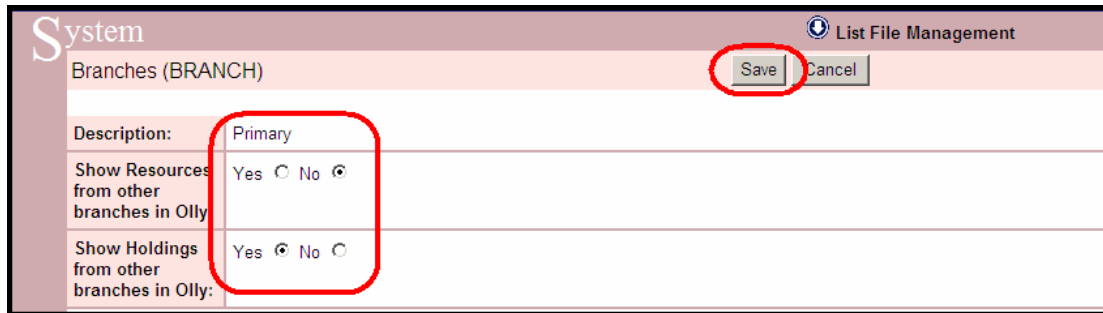
## Cross Branch Viewing Privileges

Please note this information is relevant to libraries with multiple branches. If you have only one branch in your Oliver system, this section does not apply.

For Olly only, each branch has two options that determine if the users from that branch can view the Resources or holdings of other branches. The options are *Show Resources from other branches* and *Show Holdings from other branches*. Both of these options are set in System > List Files > Branches.

System List File Management				
Description:				
<input type="text"/> <input type="button" value="Add"/>				
Show resources from other branches in Olly:				
Yes <input checked="" type="radio"/> No <input type="radio"/>				
Show holdings from other branches in Olly:				
Yes <input checked="" type="radio"/> No <input type="radio"/>				
Description	Show Resources from other branches in Olly	Show holdings from other branches in Olly		
Central	yes	yes	Delete	Edit
Primary	no	yes	Delete	Edit
Secondary	yes	yes	Delete	Edit

To change a branch's settings click the *Edit* link from the Branch list, select the appropriate options and click *Save*.



The screenshot shows a web interface titled 'System' with a 'List File Management' link. Below the title bar, there's a section for 'Branches (BRANCH)' with a 'Save' button circled in red. Below this, there are three rows of settings:

Description:	Primary
Show Resources from other branches in Olly:	Yes <input type="radio"/> No <input checked="" type="radio"/>
Show Holdings from other branches in Olly:	Yes <input checked="" type="radio"/> No <input type="radio"/>

The *Show Resources from other branches* option determines if the search results will include Resource records from other branches. When this option is set to *Yes*, the *Show holdings from other branches* option should also be set to *Yes* as there isn't much value in letting users know what Resources another branch has without telling them the copy information.

However, there is value in letting users know that a resource from their own branch has copies in another branch. This is achieved by setting the *Show Resources from other branches* option to *No* and setting *Show holdings from other branches* to *Yes*.

## Direct Links to Olly

For libraries with only one branch the format of the link is:

[http://server\\_name/oliver/gateway/gateway.exe?application=oliver&displayform=ollie/home&application=oliver](http://server_name/oliver/gateway/gateway.exe?application=oliver&displayform=ollie/home&application=oliver)

Replace **server\_name** with the name of your Oliver server.

**Note:** The remainder of this section is relevant to libraries with multiple branches. If you have only one branch in your Oliver system, this information does not apply.

There are two types of direct URL links (other than the *Olly* links on the OPAC screens) that can be used to display the Olly interface: a *No Branch* link and a *Branch Specific* link. Both of these links can be used as a desktop shortcut, an internet browser's favourite or home page, or as a link from another website/Intranet.

The *No Branch* link opens the Olly interface with no branch selected; however, if the *defaultbranch* parameter has a branch specified, the library's default branch is displayed. When no branch is selected, users will see the Resources from every branch. Alternatively, users can select a specific branch by clicking the *my branch* icon (see the following image).

If the user logs in, their branch's Resources are displayed. When the user logs out, the original branch setting is used; that is, either every branch is displayed or the default branch is displayed.



The *Branch Specific* link opens the Olly interface with a branch preselected. This link also hides the my branch icon so users cannot select another branch. If the user logs in, their branch's Resources are displayed but they cannot select another branch. When the user logs out, the preselected branch is displayed again.

Each branch can use the *Branch Specific* link on their own OPAC computers, so users will only see the Resources for the branch that they are currently in.

The format of the *No Branch* link is:

`http://server_name/oliver/gateway/gateway.exe?application=oliver&displayform=ollie/home&application=oliver`

Replace **server\_name** with the name of your Oliver server.

The format of the *Branch Specific* link is:

`http://server_name/oliver/gateway/gateway.exe?application=oliver&displayform=ollie/home&application=oliver&homebranch=name_of_branch`

Replace **server\_name** with the name of your Oliver server and replace **name\_of\_branch** with the branch that users will view. The name of the branch must match a value from System > List Files > Branches.

## Olly Display Name

You can also customise the branch name that is displayed in Olly from System > List Files > Branches by selecting *Edit* then entering your new *Olly display name* and clicking *Save*.

Branches (BRANCH)	
Description:	Central
Olly display name:	Main Library

## Other Parameters

There are three other parameters in System > Custom Parameters that have an affect on Olly: *OllyNewDays*, *OllyLibraryName* and *defaultBranch*



## OllyNewDays

The *OllyNewDays* parameter determines the number of days since a new resource has been catalogued that it will still be displayed as a “new” resource. New Resources show the *New* icon in the search results.



All of the new Resources can be viewed by clicking New button option from the Olly Home screen.

## OllyLibraryName

The *OllyLibraryName* parameter determines the library name that is displayed on the Olly *Home* screen when a user is not logged in. Once a user logs in, the library name is hidden and their branch is displayed.



## defaultBranch

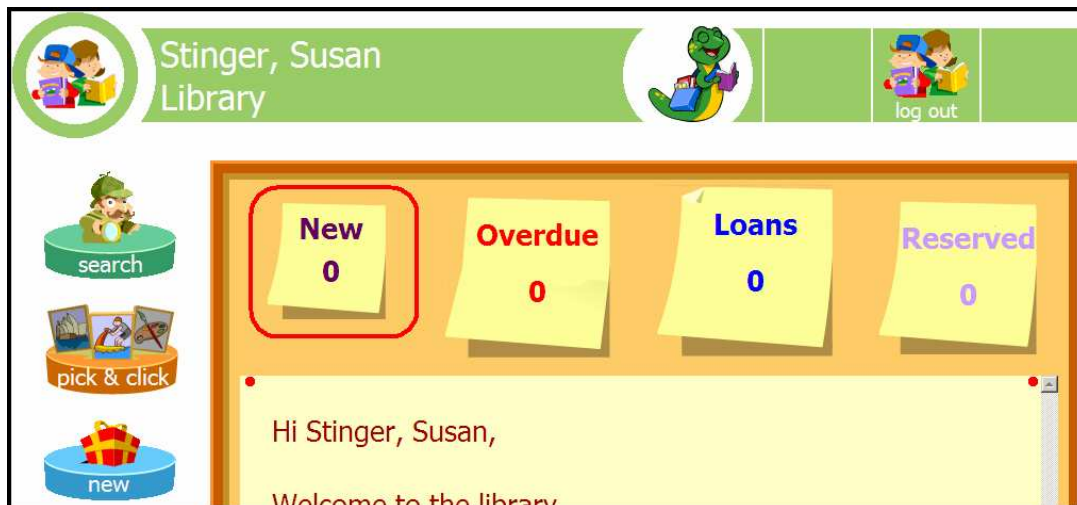
The *defaultBranch* parameter is used by multiple aspects of Oliver, in Olly it determines the branch to view when the user is not logged in. When a branch is specified, it is shown below the library's name. The name of the branch must match a name from System > List Files > Branches.





## New “Interesting Resources”

When a Borrower logs into Olly, the *New* “post-it note” (see the image below) can be clicked to display any new Resources that the Borrower may be interested in.

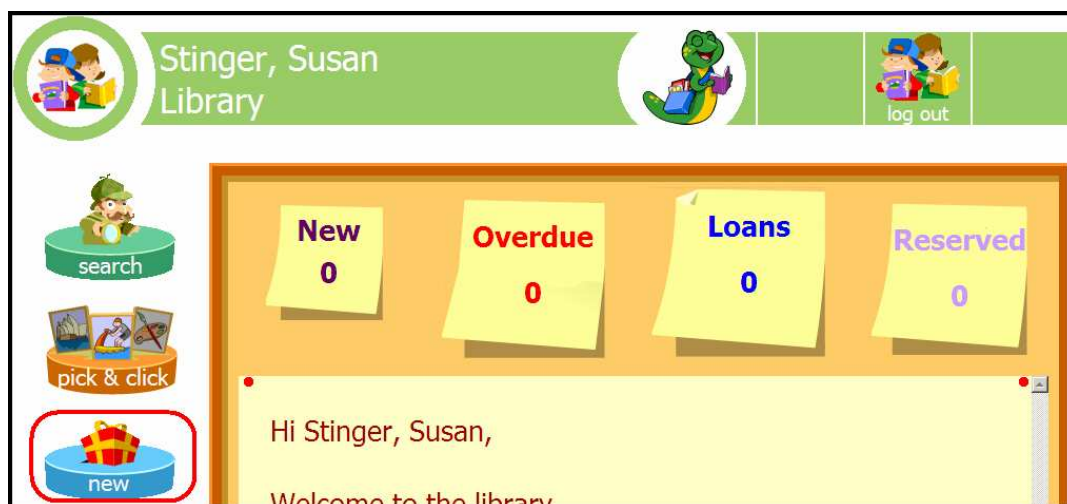


The definition of “new interesting Resources” is:

- The Borrower’s last 12 months of loan history is checked to identify all the Authors and Series they have been issued.
- Any Resources catalogued recently that have any of these authors or series are displayed. The term “recently” is actually specified by the value of the *OllyNewDays* parameter, which has a default value of 30 days.

**Note:** The *New* “post-it note” is separate to both the SDI function in the standard OPAC and the other *New* button also displayed on the Olly screen.

Clicking the other *New* button (see the image below) displays all Resources that have been catalogued recently, regardless of the logged in Borrower being interested in them. Again the term “recently” is specified by the *OllyNewDays* parameter.



## Pick & Click

This feature is known as *Picture Search* in the Oliver OPAC and in the Oliver staff interface, uses a “one click” graphical interface to display a list of Resources that meet the selected *Picture Card*’s predefined search strategy. Clicking the *Pick & Click* icon displays the *Card Selection* screen: it is a single scroll screen of *Picture Cards* that also has a set of *Alphabetical* links.




Clicking a card lists all of its Resources in the usual Olly Search Results screen. To return to the *Card Selection* screen click the *Back* icon.



Pick & Click is maintained via Cataloguing > Picture Search. This list contains a set of default records that can be edited or deleted. New records can be created by selecting New from the *Picture Search Function menu*. Each record represents a single *Picture Card*.

Welcome <b>oliver</b> , you are here: <a href="#">Library Home</a> > <a href="#">Management Home</a> > <a href="#">Cataloguing</a> > <a href="#">Picture Search</a> <span style="float: right;"><a href="#">Circulation Desk</a></span>					
Management Home	<b>Cataloguing</b>		Results: 26 records	<a href="#">Picture Search</a>	
Cataloguing	No.	Name	Description	Show	
Resources	1	Animals	Animals	✓	E
Book Review	2	Art	Art	✓	E
Authority files	3	Communications	Communications	✓	E
<b>Picture Search</b>	4	Crafts and Hobbies	Crafts and Hobbies	✓	E
Stocktake					
Weeding					
Archive					
Exchange					
Circulation					

Viewing an individual record displays the *Search Strategy* that is used when the card is selected in the OPAC. In the following image Resources that contain any of the listed subjects will be displayed for the *Animals* card.

Cataloguing		1 of 26	<a href="#">Picture Search</a>
<a href="#">Table</a>   <a href="#">Update</a>   <a href="#">Delete</a>			
<b>Name:</b>	Animals		
<b>Description:</b>	Animals		
<b>Search Strategy:</b>	(Animals or Birds or Cats or Dinosaurs or Dogs or Fish or Insects or Lions or Mammals or Pets or Reptiles or Rodents or Tigers or Zoos OR (Extinct ADJ Animals) OR (Farm ADJ Animals)).subjects.		
<b>Image:</b>	Animals.bmp 		
<b>Show in OPAC:</b>	✓		

To change the resources that are displayed for a particular *Picture Card*, edit the appropriate record and change the *Search Strategy* field.

Cataloguing		<input type="button" value="Save"/> <input type="button" value="Cancel"/>
<b>Name:</b>	<input type="text" value="Animals"/>	
<b>OPAC Display:</b>	<input checked="" type="radio"/> Show <input type="radio"/> Hide	
<b>Description:</b>	<input type="text" value="Animals"/>	
<b>Search Strategy:</b>	<input type="text" value="(Animals or Birds or Cats or Dinosaurs or Dogs or Fish or Insects or Lions or Mammals or Pets or Reptiles or"/>	
	<small>Any valid search query can be entered up to a maximum of 200 characters. It is recommended that the OR operator is manually entered between each term, and that each term is a subject. If a Picture Search option does not display any results, try simplifying the search query.</small>	
<b>Current Image:</b>	Animals.bmp	
<b>New Image:</b>	<input type="text"/>	<input type="button" value="Browse..."/>

The following table describes the fields on *Picture Card Edit* screen:

Field	Description
Name	The <i>Name</i> field stores the picture card's title that is displayed in the OPAC.
OPAC Display	The <i>OPAC Display</i> setting determines if the card is shown in the OPAC.
Description	The <i>Description</i> field is for internal use only.
Search Strategy	Any valid search strategy can be entered up to the maximum of 200 characters in the <i>Search Strategy</i> field. It is recommended that the OR operator is manually entered between each search term, and that the search term is a subject.
Current Image and New Image	The name of the current picture is shown in the <i>Current image</i> field. A new image can be allocated by clicking the <i>Browse</i> button from the <i>New Image</i> field.

**Note:** The Oliver Junior Installation CD has an Extra Pic Search Images folder that contains more than 400 additional images which can be freely used. To allocate one of these images click the Browse button (see the previous image) and select the appropriate image.